ADMINISTRATIVE FUNCTIONS

DESCRIPTION

Administrative functions include those systems necessary to manage the delivery of mental health services. This includes establishing clear and efficient procedures for scheduling clients, collecting and managing client data, record keeping, and documentation.

RATIONALE

A defined administrative management system is necessary in order to comply with clinical, legal, financial, institutional, and accredited/oversight organization regulations. Thorough case documentation supports the monitoring of treatment progress and is critical in terms of liability. Data collected is also used within an overall quality assessment and improvement plan. Documenting the impact of the program not only allows school mental health providers to understand and improve their preventive and treatment efforts, it provides funders and community stakeholders with valuable information about the effectiveness of the program.

RECOMMENDATIONS

The following recommendations addressing client scheduling, data management, documentation, and case records are directed at schools and school mental health providers seeking to establish or strengthen their administrative management system.

Client Scheduling

1. Establish a standard and consistent duration for appointments (e.g., 30 minutes, 45 minutes, 50 minutes).
2. Establish a policy on taking students out of class for their appointments.
3. Consider the school bell schedule when scheduling appointments.
4. Consider pre-scheduled mandatory testing schedules and school holidays.
5. Communicate with teachers both initially and at regular intervals regarding procedures for students who miss class time due to scheduled appointments.
6. Establish a late arrival and “no show” policy.
7. Establish guidelines about “double booking” the schedule and in what instances this is appropriate.

Data Management

1. Collect demographic data and insurance information on all students during intake.
2. Utilize a daily record form to document all services provided.
3. Calculate an end-of-the month tally of clients served and services provided.
4. Securely store all client data either in a locked file cabinet or in a password-protected electronic file.

Documentation/Paperwork

1. Develop a user-friendly training manual for school mental health providers including well defined policies and procedures related to scheduling clients, managing data, and maintaining records.
2. Include a sample paperwork packet and paperwork flowchart for reference.
3. Inform school mental health providers if changes or updates in documentation are required, and make a new sample paperwork packet available.
4. Create a document that has summarized frequently asked questions and common errors in documentation within your school mental health program.

5. Designate adequate time within your daily appointment schedule to complete documentation, consult with colleagues and complete case management duties.
6. Strategize with school mental health providers on how to meet documentation requirements effectively and efficiently.

Case Records
A case record involves the systematic documentation of a student's mental health history and care in a private and confidential context. Students and their families have a right to expect that a student's personal information will be kept confidential and that only information necessary to providing appropriate mental health services will be shared.

1. Ensure that all records are maintained in compliance with each state's statute.
2. Complete progress notes for any mental health service within the same day.
3. Place a copy of all screenings, assessments, treatment plans, and progress notes in the student's mental health chart/record.
4. Include the following in a progress note:
    - Date, Time, Duration
    - Diagnosis
    - Type of Contact
    - Content of Session
    - Assessment Strategies
    - Intervention Strategies
    - Progress on Objective Treatment Goals
    - Family Involvement
    - Collateral Involvement
    - Plans for Future Intervention

REFERENCES

The University of Maryland's Center for School Mental Health (2008). *School Mental Health Quality Assessment Questionnaire (SMHQAQ) Quality Indicator Power points, Indicators 18, 21*. Retrieved from http://www.schoolmentalhealth.org/Resources/Clin/QAIRsrc/QAQPP.

RESOURCES

http://www.schoolmentalhealth.org/Helpful%20Forms/hlpfulforms.html
Forms developed by the University of Maryland School Mental Health Program and affiliated programs

http://apa.org/practice/recordkeeping.html
American Psychological Association (APA)'s record keeping guidelines.

http://mhsip.org/toolkit/chapter4.html
The Mental Health Statistics Improvement Program (MHSIP)'s Consumer-Oriented Mental Health Report Card Toolkit. Includes information on general data management protocols.